

**Business Technology**  
**Financial Planning**  
**Course Code # 3713**  
**½ Credit**

School Year \_\_\_\_\_

Term: \_\_\_\_Fall\_\_\_\_Spring

*Prerequisites: Principles of Business or Business Economics or Economics*  
*Recommended Prerequisites or Concurrent with: Internet Navigation Communication Systems, Accounting*

Student:	Grade:
Teacher:	School:
Number of Competencies in Course: <b>27</b>	
Number of Competencies Mastered:	
Percent of Competencies Mastered:	

**Standard 1.0 The student will evaluate the diverse finance career opportunities.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
1.1	Analyze finance career opportunities.			
1.2	Assess the employment outlook in financial careers.			
1.3	Compare the earning power of various careers.			

**Standard 2.0 The student will investigate financial management strategies.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
2.1	Analyze the financial position of a business.			
2.2	Analyze money management strategies.			
2.3	Plan tax strategies.			
2.4	Examine purchasing strategies and alternatives for legal protection.			

**Standard 3.0 The student will compare the different types of financial institutions.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
3.1	Examine the American banking system.			
3.2	Determine benefits of various financial institutions.			
3.3	Analyze the financing of products and resources.			

**Standard 4.0 The student will examine various investment opportunities.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
4.1	Examine the importance of financial stability.			
4.2	Distinguish between the different types of investments.			
4.3	Predict investment returns.			

**Standard 5.0 The student will evaluate the use of credit.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
5.1	Define terms relating to international economics.			
5.2	Investigate the credit industry.			
5.3	Analyze the cost of buying on margin.			
5.4	Assess ways to solve credit problems.			

**Standard 6.0 The student will design a plan for the administration and disposition of estate property.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
6.1	Interpret vocabulary terms related to wills and estates.			
6.2	Appraise various trusts and estates.			
6.3	Evaluate the effects of federal and state taxes on estate planning.			
6.4	Examine the laws governing the management and disposition of an estate.			

**Standard 7.0 The student will demonstrate organizational and professional leadership skills.**

Learning Expectations		Check the appropriate Mastery or Non-Mastery column	Mastery	Non-Mastery
7.1	Demonstrate self-initiative through group projects.			
7.2	Examine the value of leadership skills.			
7.3	Illustrate image building and public relations techniques.			
7.4	Assess decision-making skills.			
7.5	Demonstrate effective teamwork conflict resolution techniques.			
7.6	Demonstrate parliamentary procedure skills through group activities.			
7.7	Analyze the goals and apply the principles of Business Professionals of America and/or Future Business Leaders of America.			

Additional comments: \_\_\_\_\_